

# Synchronizing Data to your laptop - Hitting the road with Microsoft CRM laptop client for Outlook

As a salesperson, you probably spend a great deal of your time on the road, in different cities with different customers. It's critical to keep your customers' information available to you and up-to-date on these business trips. By synchronizing your data with the head office, you can keep the information on your laptop current, and keep your managers and coworkers up-to-date, as well.

However, synchronizing all of your business's Microsoft CRM data can mean long synchronization times and eat up memory on your laptop. Using the Microsoft CRM 3.0 laptop client for Microsoft Office Outlook, you can set up and activate a local data group. Using criteria similar to Advanced Find, you can select which Microsoft CRM records will be available offline. You can activate and deactivate these local data groups when you synchronize so you can change the data that you want to have available.

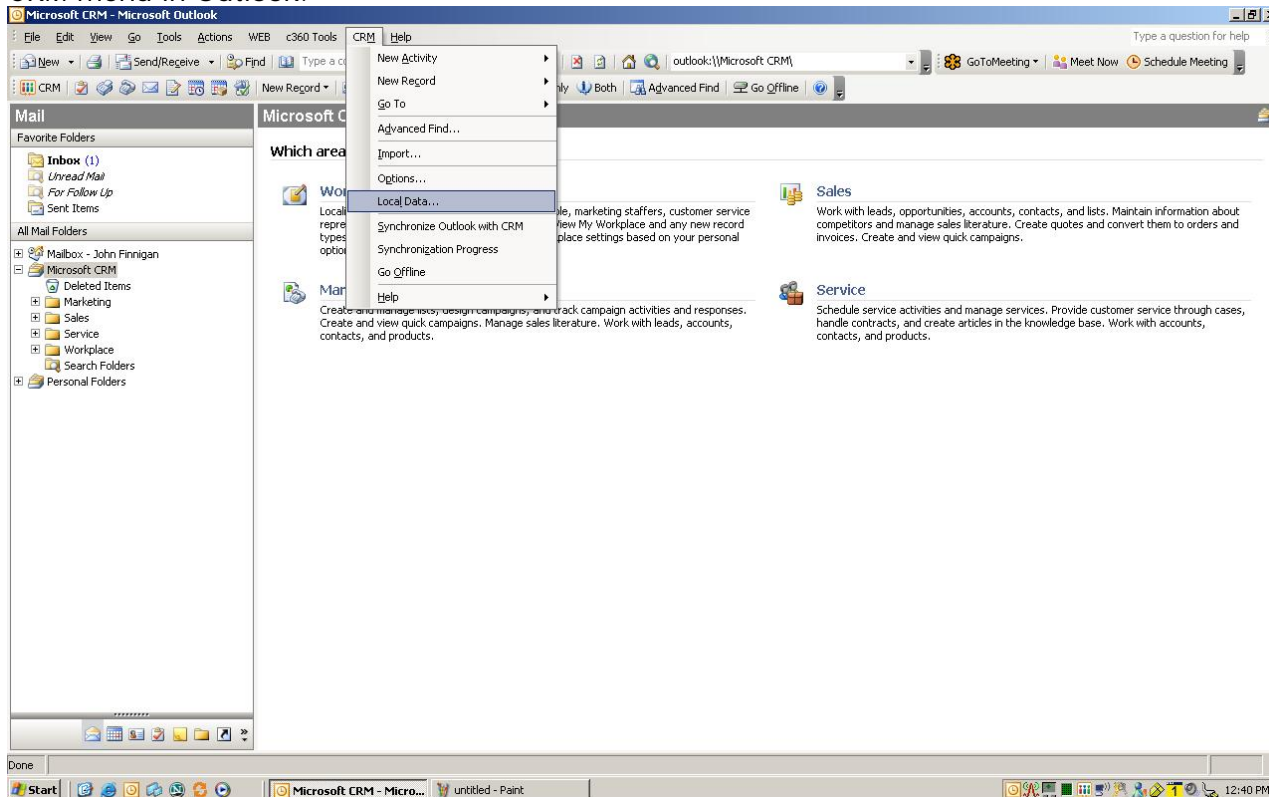
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## SELECT THE DATA YOU NEED WITH LOCAL DATA GROUPS

### Open "local data groups" from within Outlook while your are "online"

You can see what data filters are being applied to your offline synchronization by clicking **Local Data** on the CRM menu in Outlook.



All of the data groups on the **Data Groups** tab are applied. Data groups are additive, so you can have more than one active at a time to take larger, combined sets of data offline.

First, a good strategy is to create a local data group that defines all of the data that you want available to you for a record type, for example, your active accounts. Save this local data group as your "master," and call it "My Active Accounts", for example. Second, you can then modify this master local data group to create different versions for specific business needs.

## SELECTING THE DATA FOR SYNCHRONIZATION

Select the category that you wish to modify.

**Local Data**  
Create and modify data groups to specify the data you want copied locally. This includes records that you want available in the offline database and synchronized to default in the offline database, if they are synchronized to Outlook.

Data Groups | Inactive Data Groups

Name	Type	Description
All Active Contacts	Contact	All Active Contacts
All Contracts	Contract	Recently changed contracts owned by me or for which I h...
All Customers	Customer	Customers owned by everyone
All open Campaign Activities owned by me	Campaign Activity	All Open Campaign Activities owned by me
All open Campaign Responses owned by me	Campaign Response	All Open Campaign Responses owned by me
All recent active Campaigns	Campaign	All recent active Campaigns
All recently changed active Lists owned by me	Marketing List	All recently changed active Lists owned by me
Attachments on Downloaded E-mail Messages	E-Mail Attachment	Attachments under 1 MB on e-mail messages I have downl...
Cases - All Active	Case	Recently changed cases owned by me or for which I have...
Competitors	Competitor	All competitors
Contracts related to my Cases	Contract	Recently changed contracts related to the cases owned b...
Employees - Active	Employee	
KB Articles	Article	Published KB Articles
My Accounts	Customer	Accounts owned by me
My Contacts	Contact	Contacts owned by me or for which I have downloaded th...
My Contracts	Contract	Recently changed contracts owned by me or for which I h...
My Recent Appointments	Appointment	Recently changed appointments owned by me or for whic...
My Recent Case Resolution Activities	Case Resolution	Recent case resolution activities associated with resolved ...
My Recent Cases	Case	Recently changed cases owned by me or for which I have...
My Recent E-mail Messages	E-mail	Recently changed e-mail messages owned by me or for w...
My Recent Faxes	Fax	Recently changed faxes owned by me or for which I have...
My Recent Leads	Lead	Recently changed leads owned by me or for which I have ...
My Recent Letters	Letter	Recently changed letters owned by me or for which I hav...
My Recent Opportunities	Opportunity	Recently changed opportunities owned by me or for which...
My Recent Opportunity Close Activities	Opportunity Close	Recent opportunity close activities associated with closed ...

By modifying the default settings to select any "Case" that "Contains Data", all cases will be automatically synchronized between the client and server.

## CASE

The screenshot shows the 'Data Group' configuration window for 'CASE'. The window has a title bar 'Data Group' and a menu bar with 'File' and 'Help'. Below the menu bar is a toolbar with icons for 'Save', 'Save As', 'New', and 'Edit Properties'. The 'Look for:' dropdown is set to 'Case' and the 'Name:' is 'Cases - All Active'. Below this is another toolbar with 'Hide Details', 'Clear', 'Group AND', and 'Group OR'. The main area contains a tree view with a root node 'OR' and two child nodes: 'Parent Downloaded' (with value 'Equals True') and 'Owner' (with value 'Contains Data'). Below this is another row with 'Status' (value 'Equals') and 'Active'. At the bottom is a 'Select' button.

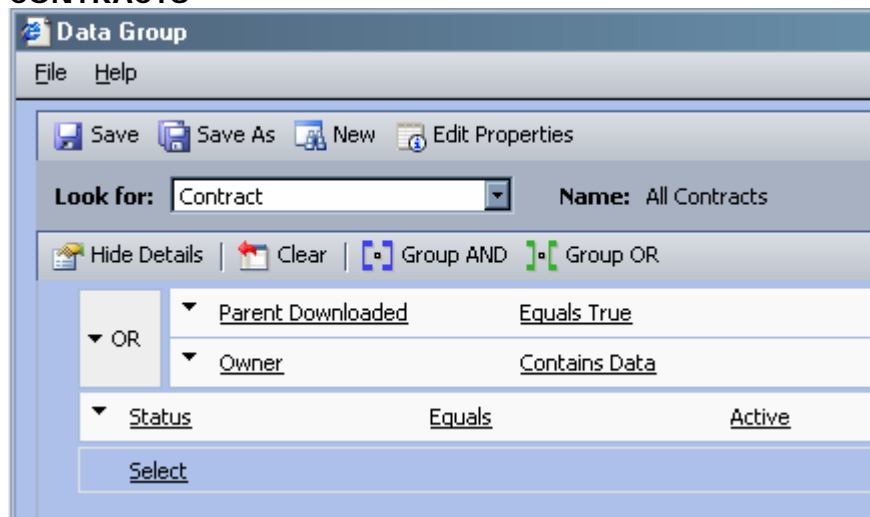
## CONTACTS

The screenshot shows the 'Data Group' configuration window for 'CONTACTS'. The window has a title bar 'Data Group' and a menu bar with 'File' and 'Help'. Below the menu bar is a toolbar with icons for 'Save', 'Save As', 'New', and 'Edit Properties'. The 'Look for:' dropdown is set to 'Contact' and the 'Name:' is 'All Active Contacts'. Below this is another toolbar with 'Hide Details', 'Clear', 'Group AND', and 'Group OR'. The main area contains a tree view with a root node 'OR' and two child nodes: 'Parent Downloaded' (with value 'Equals True') and 'Owner' (with value 'Contains Data'). Below this is another row with 'Status' (value 'Equals') and 'Active'. At the bottom is a 'Select' button.

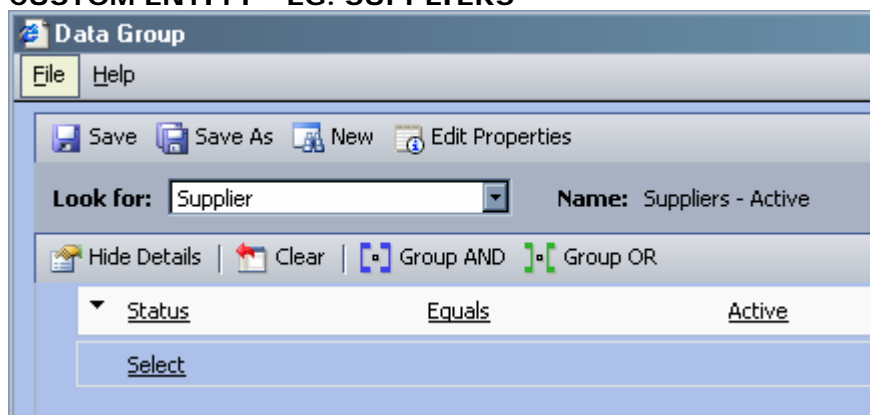
## ACCOUNTS / CUSTOMERS

The screenshot shows the 'Data Group' configuration window for 'ACCOUNTS / CUSTOMERS'. The window has a title bar 'Data Group' and a menu bar with 'File' and 'Help'. Below the menu bar is a toolbar with icons for 'Save', 'Save As', 'New', and 'Edit Properties'. The 'Look for:' dropdown is set to 'Customer' and the 'Name:' is 'All Customers'. Below this is another toolbar with 'Hide Details', 'Clear', 'Group AND', and 'Group OR'. The main area contains a tree view with a root node 'OR' and two child nodes: 'Owner' (with value 'Contains Data') and 'Status' (value 'Equals') and 'Active'. At the bottom is a 'Select' button.

## CONTRACTS



## CUSTOM ENTITY - EG. SUPPLIERS



## DEACTIVATE OR ACTIVATE DATA GROUPS

To deactivate a data group, on the Data Groups tab, select one or more data groups. On the tool bar, click the Deactivate button (a red circle with a red square). This deactivates all of the data groups and moves them to the Inactive Data Groups tab.

To activate a data group, on the Local Data dialog box, on the Inactive Data Groups tab, select one or more data groups and then click the Activate button (a green circle with a green triangle). All active data groups appear on the Data Groups tab.

To edit an existing data group, double-click on the item in the list.

Keep the original data group on the **Inactive Data Groups** tab, make a copy using **Save As**, and add additional criteria, such as "Address 1: State/Province equals WA". Save it with a new name such as "My Accounts in Washington."

Using **Save As** again, change the criteria to "Address 1: State/Province equals OR", and name your new data group "My Accounts in Oregon."

Before your trip, deactivate all of the data groups except the ones that apply to the customers in the first area you are visiting.

The Local Data shows the default categories and selection as installed by the client.

We need to modify these as the default settings will only download information assigned to each specific user rather than all information

## **TAKE YOUR DATA OFFLINE AND SYNCHRONIZE YOUR DATA**

Now you are ready to go offline. Your data will be synchronized automatically every time you go offline and again when you go online. If this is the first time that you have changed your local data groups' settings, this may take a while. Future synchronizations will be faster, because you are synchronizing less data.

Take your data offline and synchronize your data

In Outlook, on the **CRM** Menu, click **Go Offline**.

While you are offline, you will be able to add new contacts and accounts or update the existing accounts and contacts you have on your laptop. When you are able to connect to your company again and go online, for example, from your hotel room, you can synchronize your data.

Go back online and synchronize your data

In Outlook, on the **CRM** Menu, click **Go Online**.

Any updated data from your laptop will be synchronized with your company's Microsoft CRM database. You can now deactivate and activate a new set of local data groups for your next visits, using the procedures explained earlier in this article.

Combine local data groups to take more information with you

Because local data groups are additive, you can have more than one active data group at a time. For example, if you are going to a conference in the Northwest United States, you can activate both the Washington and the Oregon data groups you created and take both sets of data offline with you.

## **SYNCHRONIZATION ERRORS/CONFLICTS**

Synchronizing data from the Outlook client for Microsoft CRM - When the Outlook client connects with the Microsoft CRM Server, all the data transactions that occurred in the Outlook client while offline are replicated to the CRM Server. When online, the Outlook client reads data directly from the CRM server, so that server data is available live through the Outlook client. When going offline, data from the Microsoft CRM Server synchronizes with the Outlook client's local database. It is the Outlook local database that allows offline access to CRM data.

If two updates conflict, the most recently entered data wins. So, the last update to the server is the update that is recognized. Data changes that are synchronized are at a field level and only relate to data changes.

For Example: You made a change yesterday when offline. Today, another person in your organization changed the same record on the server. Tomorrow, when you synchronize, the CRM server will recognize your changes as the "winner" since they appeared most recently.